

PI COMPANION

Reference Profiles, Team Types & Strategy Types

People data: providing awareness on multiple levels

Self-awareness. It's a much-discussed, highly valued, yet often elusive trait.

Typically, we discuss self-awareness at the individual level. You're likely familiar with the 17 Reference Profiles, which offer insights into a person's strongest behavioral drives, tendencies, and caution areas. Understanding your own behavioral type, as well as those of close colleagues, fosters **self-awareness at the individual level**.

But what if you took it a step further? Behavioral data applies on multiple planes, permeating not just "you," but your team, and by proxy, your strategy.

Understanding your Team Type gives you a sense for how different behavioral profiles complement—or butt up against—each other. Team Discovery is an exercise in **group self-awareness**, helping you visualize strengths and shortcomings in a team setting.

You can then apply those findings to your Strategy Type. Is your team aligned with its goals? Organizational self-awareness is about recognizing areas of misalignment, and adjusting teams and strategies accordingly.

Alignment breeds cohesion. And cohesive teams work in sync, toward common goals. Understand how you work, but also how your team works best together, and how that style fits into the broader business picture. That's the essence of **talent optimization**.

In this guide, we'll dive into:

- The 17 Reference Profiles
- The 9 Team Types
- The 10 Strategy Types



Contents

The 17 Reference Profiles	2
Analytical Profiles	4
Social Profiles	10
Stabilizing Profiles	17
Persistent Profiles	22
Team Types	25
Strategy Types	31

The 17 Reference Profiles



The Four Factors

At the Predictive Index (PI), we've been conducting behavioral assessments for over 65 years. Since the very beginning, PI has quantified people's behavioral drives in the workplace in four areas that give us an enormous amount of insight about how someone will behave at work. We call them the Four Factors.

Here are the Four Factors and how we define them:

Dominance: The drive to exert one's influence on people or events

Extraversion: The drive for social interaction with other people

Patience: The drive for consistency and stability

Formality: The drive to conform to rules and structure

When someone takes a PI Behavioral Assessment, their Reference Profile is based on these Four Factors.

Reference Profiles Explained

After a thorough analysis of millions of Behavioral Assessments, the PI Science Team identified 17 "Reference Profiles" that create a behavioral map for different types of people. You can think of them as easy-to-reference groupings of the characteristics of people who have similar drives.

Once you know someone's Reference Profile, you gain insight into their defining workplace behaviors, as well as, how to work with them more effectively and what kind of traps and pitfalls they have a tendency to fall into. Understanding your own Reference Profile—and your coworkers' Reference Profiles—can be incredibly useful. After all, almost all business problems are people problems, and if you know how to effectively work with the wide array of workplace behaviors, you and your team will be more likely to succeed.

Analytical Profiles

The Reference Profiles in the Analytical group are more dominant than extraverted and work at a faster pace. They are generally more task oriented as opposed to people oriented.



ANALYZER



CONTROLLER



SPECIALIST



STRATEGIST



VENTURER



Analyzer

An Analyzer is intense, with high standards and a disciplined and reserved personality.

NEEDS:

Understanding of the big picture

Room for introspection

Opportunities to work at a fast pace

Freedom from risk of errors

BEHAVIORS:

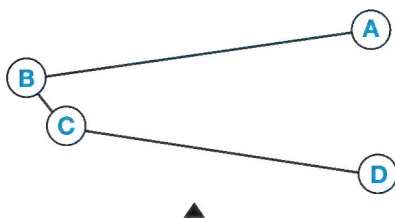
Assertive

Pensive

Intense

Thorough

Average Behavioral Pattern



Signature work styles:

Communication

- Reserved, takes time to think
- Direct, generalist

Delegation

- Selective in delegating both details and authority
- Close follow-up to ensure quality

Decision making

- Imaginative problem-solver
- Drive to make decisions but can "second-guess" them

Action & risk

- Drive to initiate action
- Risk-averse, wants all the answers before taking action

Strengths:

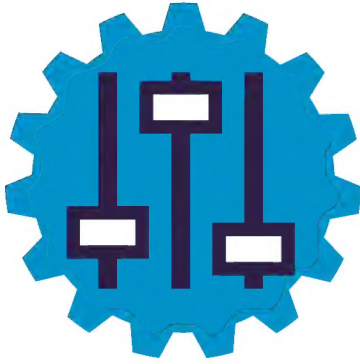
- Disciplined and strong on execution
- Innovative and self-motivated
- Data-driven and analytical

Common traps:

- Can be seen as a perfectionist with high standards
- May be skeptical if they don't have enough information
- Often hesitant to take action without having all the information up front

How to work well with them:

- Give them room; don't micromanage them. Analyzers like to express and implement their own ideas.
- Don't pressure Analyzers to make quick decisions. They feel more comfortable when the decision is within their area of expertise or if they can manage the risk involved.
- Bring challenges to Analyzers. They like opportunities to showcase both their expertise and their creative problem solving abilities.



Controller

A Controller is detail-oriented and conservative, with a preference for high quality and technical expertise.

NEEDS:

Autonomy in problem solving

Room for introspection

Opportunities to work at a fast pace

Understanding of rules and regulations

BEHAVIORS:

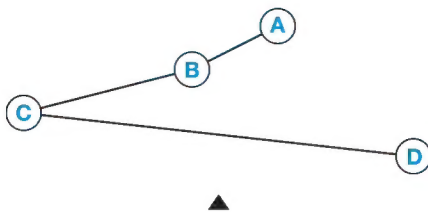
Autonomous

Matter-of-fact

Impatient

Precise

Average Behavioral Pattern



Signature work styles:

Communication

- Factual, straightforward
- Thinks before speaking

Delegation

- Very tight delegation
- Controls closely and critically

Decision making

- Makes decisions firmly and quickly if they can follow “the book”
- Ingenuity in problem-solving in areas within own specialty

Action & risk

- Avoids risk
- Conservative

Strengths:

- Builds structure and has respect for the plan
- Anticipates problems
- Proactive and results-oriented

Common traps:

- Can have difficulty delegating authority
- Resistant to change if it feels too brusque
- Likely to feel uncomfortable in ambiguous situations

How to work well with them:

- Give them specifics; Controllers want to know what they’re talking about.
- Since Controllers like to do things by the book, provide them with a clear definition of responsibilities and authority.
- Stay on track and on time; Controllers like to run a tight ship.



Specialist

A Specialist is a highly precise worker, who remains skeptical while respecting authority.

NEEDS:

Encouragement

Opportunities to work with facts

Opportunities to work at a faster than average pace

Understanding of rules and regulations

BEHAVIORS:

Accepting of company policies

Matter-of-fact

Fast-paced

Precise

Average Behavioral Pattern



Signature work styles:

Communication

- Reserved, introspective
- Thinks before speaking

Delegation

- Takes time to earn trust
- Will provide a lot of structure with delegation

Decision making

- Cautious
- Needs the details before making decisions

Action & risk

- Conservative and careful
- Highly responsive

ANALYTICAL PROFILES

Strengths:

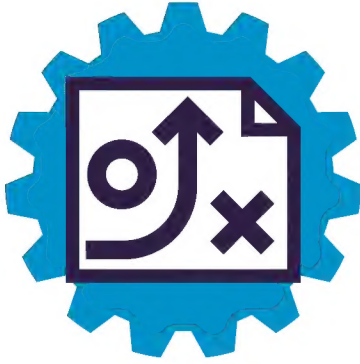
- Understanding and collaborative
- Thoughtful approach to communicating information
- Strong discipline and execution

Common traps:

- Can be exceedingly cautious when action is required
- Communication may be pointed and sparse
- May not be comfortable in ambiguous situations

How to work well with them:

- Give them time to develop their specialty; they're more confident once they're fully trained or have more experience.
- Provide clarity to Specialists, so that they can do things the right way without risk of making mistakes.
- Recognize their specialized skills to help them feel secure.



Strategist

A Strategist is results-oriented, innovative and analytical with a drive for change.

NEEDS:

Understanding of the big picture

Opportunities to work with facts

Variety and flexibility

Time to develop expertise

BEHAVIORS:

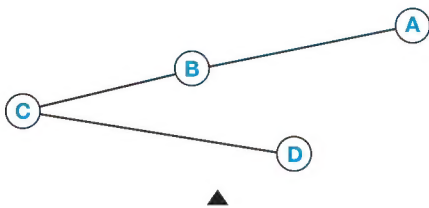
Independent

Reflective

Intense

Organized

Average Behavioral Pattern



Signature work styles:

Communication

- Reserved, introspective
- Authoritative

Delegation

- Delegates details more freely than authority, but tight with both
- Controlling with frequent check-ins

Decision making

- Results-oriented
- Decisive

Action & risk

- Innovative, self-motivated
- Calculated risk-taker

Strengths:

- Able to think big picture and anticipate problems
- Able to deal with pressure and multiple priorities
- Organized and thorough follow-up

Common traps:

- May appear tough-minded and directive
- May be intolerant of delays or stagnant environments
- May be seen as a perfectionist

How to work well with them:

- Keep things moving to satisfy Strategists' desire to get things done quickly.
- Follow directions; Strategists want things done correctly.
- Give Strategists time to develop their expertise; they want to be confident in the knowledge they've acquired.



Venturer

A Venturer is a self-starting, self-motivating, and goal-oriented risk-taker.

NEEDS:

Independence

Opportunities to reflect

Variety

Freedom from structure and rules

BEHAVIORS:

Assertive

Analytical

Driving

Non-conforming

Average Behavioral Pattern



Signature work styles:

Communication

- Direct, factual, outspoken, frank
- Authoritative

Delegation

- Hesitant to delegate major authority or responsibility
- Delegates details freely

Decision making

- Innovative problem-solver
- Values own judgments more than others

Action & risk

- Takes initiative
- Willing to take risks

Strengths:

- Drives change and challenges status quo
- Able to think big picture and anticipate problems
- Purposeful approach to most situations and people

Common traps:

- Can appear tough-minded and directive
- May be dissatisfied or uncomfortable working under close supervision
- Probably won't adhere to structure or direction

How to work well with them:

- Keep it high level; Venturers are more concerned about achieving goals than the details needed to get there.
- Don't micromanage, let them prove themselves.
- Don't slow Venturers down; they thrive on getting things done.

Social Profiles

The Reference Profiles in the Social group are highly extraverted compared to other behavioral drives. In the workplace, people in this group tend to focus on relationships.



ALTRUIST



CAPTAIN



COLLABORATOR



MAVERICK



PERSUADER



PROMOTER



Altruist

An Altruist is congenial and cooperative with an efficient, precise work ethic.

NEEDS:

Harmony

Opportunities to interact and collaborate

Opportunities to handle multiple priorities

Clarity of expectations

BEHAVIORS:

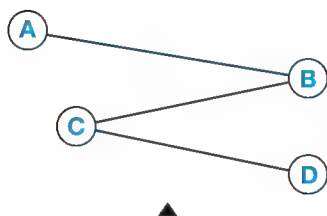
Cooperative

Sociable

Fast-paced

Organized

Average Behavioral Pattern



Signature work styles:

Communication

- Extraverted, enthusiastic
- Persuasive talker

Delegation

- Close follow-up after delegating details

Decision making

- Brings others into the decision-making process
- Makes decisions carefully and cautiously

Action & risk

- Cautious, avoids risk
- Responds well to pressure

Strengths:

- Builds team cohesion and collaboration
- Organized and thorough follow up
- Multitasker, able to juggle priorities

Common traps:

- May be seen as too cautious and not strategic enough
- May be too optimistic or overly trusting
- May become frustrated in stagnant environments

How to work well with them:

- Give them guidelines; Altruists like clear, specific definitions of the job, responsibilities and relationships.
- Mix it up; Altruists like variety in their work.
- Let them help and collaborate; they like being part of a team.



Captain

A Captain is a problem solver who likes change and innovation while controlling the big picture.

NEEDS:

Independence

Connection with others

Variety and change

Flexibility

BEHAVIORS:

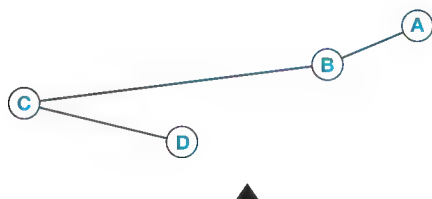
Competitive

Enthusiastic

Driving

Non-conforming

Average Behavioral Pattern



Signature work styles:

Communication

- Authoritative, telling
- Articulate communicator

Delegation

- Delegates authority and details somewhat freely

Decision making

- Innovative problem-solver
- Push to decide things quickly

Action & risk

- Risk-taker, responds positively to pressure
- Self-starter

Strengths:

- Seeks to lead and have an impact
- People-oriented, sociable
- Able to deal with time pressure and change

Common traps:

- Can seem authoritative
- May appear to be brusque
- Struggles to adhere to structure or direction

How to work well with them:

- Give them room; Captains want flexibility in their activities.
- Let Captains grow; they want opportunities to learn, advance or demonstrate responsibility.
- Challenge them; they like tackling tough problems.



Collaborator

A Collaborator is a friendly, understanding, willing and patient team player.

NEEDS:

Freedom from individual competition

Opportunities to work with others

Supportive work team

Freedom of expression

BEHAVIORS:

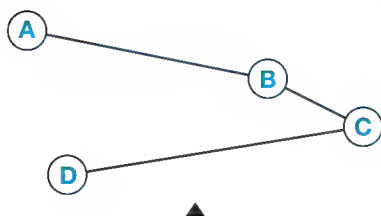
Cooperative

Empathetic

Patient

Casual

Average Behavioral Pattern



Signature work styles:

Communication

- Open, approachable, persuasive
- Understanding listener

Delegation

- Delegates authority and details freely

Decision making

- Brings people into the decision

Action & risk

- Dislikes risk
- Responsive more than proactive

Strengths:

- Understanding and collaborative
- People-oriented, sociable
- Patience with routines

Common traps:

- Can have difficulty making unpopular decisions
- May not have great follow through with details
- Sometimes appear to others as being too casual

How to work well with them:

- Let them collaborate; Collaborators like to communicate with and involve others.
- Show them the love; they want consistent, dependable management and support.
- Keep it friendly; Collaborators don't like competitive pressure.



Maverick

A Maverick is an innovative, “outside the box” thinker, who is undaunted by failure.

NEEDS:

To be challenged

Opportunities to influence

Variety

Freedom from rules and controls

BEHAVIORS:

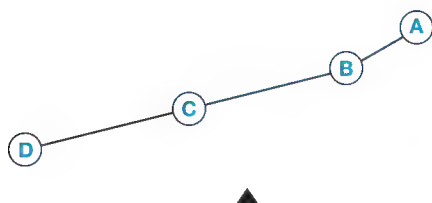
Venturesome

Enthusiastic

Driving

Tolerant of uncertainty

Average Behavioral Pattern



Signature work styles:

Communication

- Forceful, direct
- Animated, telling

Delegation

- Freely delegates with loose follow-up

Decision making

- Innovator
- Confident decision-maker

Action & risk

- Thinks risk is necessary, “the end justifies the means”
- Quick to act

Strengths:

- Responds positively to challenges and pressure
- Visionary that includes people in the planning
- Goal-oriented

Common traps:

- May appear tough-minded
- Can be intolerant of and frustrated by delays
- May not adhere to structure or direction
- Needs to be reminded to listen to others’ perspectives

How to work well with them:

- Hand them the reins; Mavericks want to take action on their own ideas and initiatives.
- Give them freedom; Mavericks like independence and flexibility.
- Remind them of the details; they’re goal-oriented but may overlook the details.



Persuader

A Persuader is a risk-taking, socially poised and motivating team builder.

NEEDS:

Independence

Opportunities to interact with others

Variety and change

Freedom from rigid structure

BEHAVIORS:

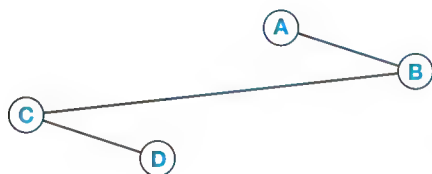
Self-confident

Persuasive, stimulating

Fast-paced

Informal

Average Behavioral Pattern



Signature work styles:

Communication

- Empathetic, persuasive selling style
- Gregarious and extraverted

Delegation

- Delegates authority and details

Decision making

- Confident decision-maker
- Works through people to solve problems

Action & risk

- Venturesome risk-taker
- Strong initiative

Strengths:

- Drives change and challenges status quo
- Motivating, stimulating communicator
- Proactive and results-oriented

Common traps:

- May appear talkative or superficial
- May provide limited follow up or attention to detail
- May appear too casual or uninhibited

How to work well with them:

- Interact with Persuaders; they like to work with and develop people.
- Give them variety; Persuaders want freedom from routine.
- Give them independence; they are ambitious and have strong initiative.



Promoter

A Promoter is a casual, uninhibited, and persuasive extravert with a tendency for informality.

NEEDS:

Harmony

Social acceptance

Supportive work team

Freedom from rigid structure of expectations

BEHAVIORS:

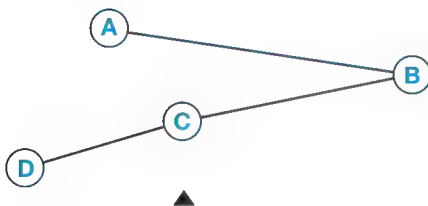
Collaborative

Outgoing

Patient

Flexible

Average Behavioral Pattern



Signature work styles:

Communication

- Fluent, persuasive talker
- Sympathetic, good listener

Delegation

- Delegates authority and details freely with little follow-up

Decision making

- Often thinks “outside the box”

Action & risk

- Negative response to pressure

Strengths:

- Motivating, stimulating communicator
- Flexible approach to most situations and people
- Doesn't take no for an answer

Common traps:

- Can be overly talkative and superficial
- May be excessively casual or uninhibited
- Sometimes prioritizes being liked or being center of attention over results

How to work well with them:

- Let them be social; Promoters like a high level of social/group activities.
- Give Promoters freedom; they prefer work that is unstructured and delegating the details.
- Let them sell; Promoters like to be recognized for persuading and motivating people.

Stabilizing Profiles

The Reference Profiles in the Stabilizing group have a low amount of Dominance and Extraversion, with high Patience and Formality. People with profiles in the Stabilizing group are generally steady, detailed, and work well with structure and processes.



ADAPTER



CRAFTSMAN



GUARDIAN



OPERATOR



Adapter

*An Adapter is a bridge-builder,
comfortable with changing situations.*

NEEDS:

NEEDS VARY

BEHAVIORS:

BEHAVIORS ARE FLEXIBLE

Average Behavioral Pattern



Special note on Adapters:

Adapters have a similar amount of each the Behavioral Drives. There is no predominant drive that really fuels his or her needs and behaviors.

Adapters can be hard to read at times because there is not a strong drive that defines his or her behavior. This situational flexibility is the beauty of the pattern as well. Adapters are generally versatile and adaptable, flexing to meet the needs of the situation. Adapters can easily work with a variety of people and are often seen as a bridge-builders or glue in a team setting. Adapters view all sides of a situation, easily putting him or herself in someone else's shoes.

Strengths:

- 1.2 Versatile, flexible
- 1.8 Empathetic
- 3.4 Bridge-builder

Common traps:

- 1.2 May be hard to "read"
- 1.8 Will benefit from communicating their thinking to mitigate uncertainty or perceived surprises in their action

How to work well with them:

- 1.2 Talk to them to learn about them; have a conversation with them to find out about their motivations and preferences.
- 1.8 Due to their inherent flexibility, Adapters have no hard and fast behavioral preferences or motivating needs.



Craftsman

A Craftsman is accommodating and analytical, while producing highly precise and accurate work.

NEEDS:

Understanding

Room for introspection

Stable work environment

Specific knowledge of the job

BEHAVIORS:

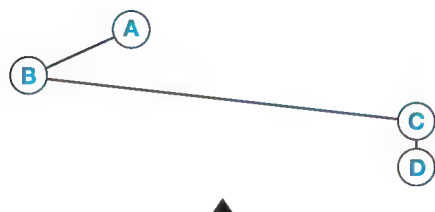
Accommodating

Analytical

Deliberate

Precise

Average Behavioral Pattern



Signature work styles:

Communication

- Reserved, quiet
- Listens thoroughly

Delegation

- Will delegate, but with careful follow up

Decision making

- Seeks direction
- Can demonstrate ingenuity when solving problems

Action & risk

- Cautious
- Careful, responsive

Strengths:

- Anticipates problems
- Thoughtful approach to communicating information
- Builds structure and has respect for the plan

Common traps:

- Sometimes overly sensitive to criticism
- May have difficulty under time pressure
- Can be uncomfortable in ambiguous situations

How to work well with them:

- If you have feedback, make it positive and constructive.
- Recognize them; Craftsmen enjoy being recognized for their technical work.
- Provide Craftsmen the details; they like to think about the technical aspects of the work.



Guardian

A Guardian is unselfish and approachable with a preference for detailed, skill-based work.

NEEDS:

Reassurance

Time to trust others

Freedom from changing priorities

Freedom from risk of error

BEHAVIORS:

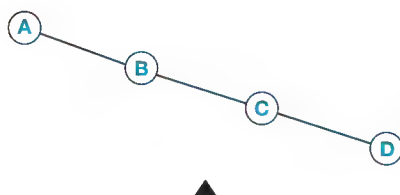
Helpful

Pensive

Steady

Diligent

Average Behavioral Pattern



Signature work styles:

Communication

- Reserved, formal
- Detailed communication style

Delegation

- Tight with delegation
- Likes to hold onto his/her work

Decision making

- Looks for consensus
- Follows "the book"

Action & risk

- Conservative, cautious
- Avoids risk

Strengths:

- Thoughtful approach when communicating
- Close attention to detail
- Strong discipline and execution

Common traps:

- May be sensitive to criticism
- May avoid conflict
- May struggle in ambiguous situations

How to work well with them:

- Train them; Guardians do best with thorough, step-by-step training 'by the book'.
- Be supportive of Guardians; they don't like conflict.
- Keep it steady, because Guardians like a stable work environment.



Operator

An Operator is a patient, conscientious, relaxed and cooperative team worker.

NEEDS:

Reassurance

Opportunities to work with facts

Freedom from changing priorities

Understanding of rules and structure

BEHAVIORS:

Cooperative

Pragmatic

Stable

Thorough

Signature work styles:

Communication

- Informal, relaxed
- More comfortable with someone familiar

Delegation

- Delegates authority and details easily

Decision making

- Likes consensus

Action & risk

- Responsive
- Careful, cautious

Strengths:

- Accepting of others decisions
- Reflective and introspective
- Focuses on how to get things done right

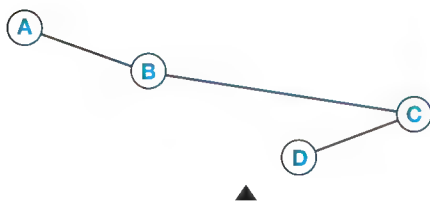
Common traps:

- May be seen as too cautious and not strategic enough
- May appear overly task-focused
- May struggle in ambiguous situations

How to work well with them:

- Reassure them; Operators want a sense of security.
- Don't pressure Operators; they prefer freedom from urgent time pressures.
- Give Operators time so they can take their preferred methodical approach.

Average Behavioral Pattern



Persistent Profiles

The Reference Profiles in the Persistent group are more dominant than extraverted, with a high amount of patience. In the workplace, people with profiles in the Persistent group are generally task-oriented and deliberate, and thrive when they have control over their own work.



INDIVIDUALIST



SCHOLAR



Individualist

An Individualist is highly independent and persistent, while remaining results-oriented.

NEEDS:

Independence

Opportunities to work with facts

Freedom from changing priorities

Flexibility

BEHAVIORS:

Self-confident

Analytical

Methodical

Non-conforming

Signature work styles:

Communication

- ▬ Directive, telling
- ▬ Factual, with strong conviction

Delegation

- ▬ Delegates details

Decision making

- ▬ Creative problem-solver
- ▬ Decisive

Action & risk

- ▬ Able to take risk
- ▬ Will act on new or unconventional ideas

Strengths:

- ▬ Drives change and challenges status quo
- ▬ Creative problem solver
- ▬ Adept at changing organizational needs

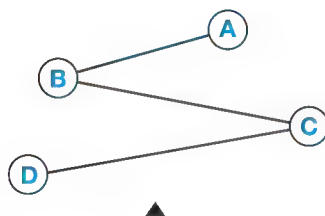
Common traps:

- ▬ May appear as stubborn or opinionated
- ▬ Can be tough-minded and authoritative
- ▬ May recoil at too much structure and direction

How to work well with them:

- ▬ Give Individualists space; they want to develop and act on their own ideas.
- ▬ Challenge them, because Individualists enjoy digging into problems and overcoming challenges.
- ▬ Give Individualists opportunity; they want management that is receptive to new ideas, change and risk.

Average Behavioral Pattern





Scholar

A Scholar is accurate, reserved, imaginative and seeks a high level of technical expertise.

NEEDS:

Independence

Opportunities to reflect

Stable work environment

Freedom from risk of error

BEHAVIORS:

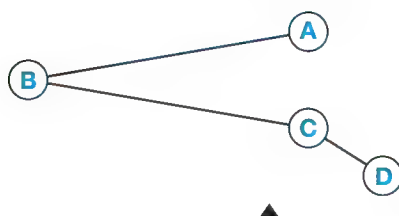
Autonomous

Introspective

Deliberate

Reserved

Average Behavioral Pattern



Signature work styles:

Communication

- Quiet, reserved
- Authoritative, telling

Delegation

- Finds it difficult to delegate

Decision making

- Analytical, imaginative
- Cautious, do things "by the book"

Action & risk

- Acts deliberately and methodically
- Protects against risk

Strengths:

- Data-driven, analytical
- Strong discipline and execution
- Organized and thorough follow-up

Common traps:

- May be cautious about acting on new or controversial ideas
- Can be anxious to avoid disagreements
- Often uncomfortable in new environments or social situations

How to work well with them:

- Give Scholars time; they want to be able to do thorough analysis.
- Scholars want to develop their expertise, so let them grow.
- They want to be responsible for their own work, so don't micromanage.

Team Types



Team Types Explained

The perfect team for running a software start-up would likely be a terrible team for running a hospital. And vice-versa. But what determines how well a team is prepared to take on one challenge versus another? How can you truly assess a team and build the right one for the business strategy you have in place?

A Team Type is a scientifically valid description of a team's collective working style. Powered by the aggregate behavioral data of individual team members, your Team Type gives you visibility into your team's superpowers—so you can lean into strengths and be aware of caution areas.

Team Types are based upon the overall behavioral emphasis of their members. First, we consider the specific behavioral pattern of each team member. Factors receive rank scores based on their value. We then plot those scores across the four Team Discovery quadrants, helping visualize that team's impact on organizational culture.

While Team Types can tell us about a team's culture, values, and natural proclivities, Strategy Types tell us about the team's goals and objectives. The combination of Team Types and Strategy Types can answer questions such as:

- How can we leverage our team's natural strengths?
- Where are our gaps when it comes to achieving our objectives?
- What does each team member bring to the table with respect to these strengths and gaps?

The PI Team Discovery tool offers insights and recommendations you can use to optimize team cohesion and performance.



PI Team Types



Exploring Team

Daring, risk-tolerant, and imaginative.

You're outgoing, cooperative, and eager to work together. You have an active desire to learn and try new things. With an eye on the big picture, you share ideas—and resources—freely and informally. Innovation is the goal. People stand by their views but are willing to listen to others. This allows for constructive conflict, which helps you pressure-test or produce new ideas.



Bolstering Team

Social, fun, and full of energy.

You're supportive of each other's ideas, and you like to brainstorm together in the name of innovation. You always cheer each other on. With an informal communication style, you enjoy robust discussions. You're proactive in helping each other and sharing information. Since you address conflict head-on, relationships—and trust—grow stronger over time.



Cultivating Team

Cooperative, supportive, and loyal.

You're a friendly and accepting team. You make group decisions and respect the consensus. For the most part, you avoid conflict. But when it occurs, you address it in a constructive manner and use it to strengthen relationships. There's a strong sense of communal ownership over work activities. Because of this, you share time, help, and resources freely.



Anchoring Team

Process-oriented, steady, and eager to help one another.

You're a cooperative, patient, and dependable group. Organized and careful in planning work activities, you still welcome input and try to get the whole team involved. Team members are highly in tune with what's going on within the organization and are less externally focused. There are established procedures for addressing conflict to minimize detrimental outcomes.



Stabilizing Team

Structured, task-focused, organized, and practical.

Known for being “by-the-book” and cautious with risk, you work together in a transactional manner with clear expectations about who does what and when. You share information on a “need to know” basis. With clearly delineated roles and tasks, you’re structured to avoid conflict. When conflict does happen, you may be slow to address it—and may prioritize damage control over relationship repair.



Executing Team

Disciplined, conscientious, and professional.

Your team can be best described as “no-nonsense.” You address conflict logically and swiftly with a focus on facts, not feelings. You collaborate when required, but otherwise, you tend to work on your own tasks individually. Team members who value each other’s expertise exchange resources such as time and information. But otherwise, resource exchange is minimal.



Producing Team

Competitive and intense.

You’re task-oriented with your eye on the prize. Cooperation with others isn’t emphasized. You tend to work together when it helps you reach your individual goals—it has to be a win-win. When exchanging resources, people may expect something in return or use information to gain influence over others. Politics often play a major role in how work gets done on your team.



Pathfinding Team

Fast-paced, goal-oriented, and competitive.

Your team can be described as “relentless.” Conflict is frequent, with each person championing their point of view. Fortunately, you see conflict as valuable—it forces you to challenge each other and think differently. You don’t always take time to coordinate with one another before acting, and this can lead to poor cooperation. Team members share resources but may not stop to think what others actually need.



Adapting Team

Flexible and well-equipped for new or changing situations.

You self-organize and work together when you see value in combining your individual strengths. You exchange information organically, and your expectations for how to work adapt over time. When conflict arises, it’s often because of behavioral differences. But your team is malleable enough to address conflict using whatever mediation strategy seems appropriate at the time.

Strategy Types



Strategy Types Explained

Knowing your Team Type is just one step in achieving business results. You also need to consider the strategy to achieve them. Understanding your team in the context of the work to be done helps you identify risks and gaps when it comes to executing your team's strategy. The Predictive Index also conducted extensive research to determine the 10 different Strategy Types that pair with those nine Team Types.

You might have noticed that many of those Strategy Types look familiar to the Team Types. However, you're not always going to have a Strategy Type that directly matches your Team Type. In fact, it's common to have a different Strategy Type, because priorities shift and new members might join the team at various times.

Don't panic: A team and strategy mismatch won't spell doom for your people. Instead of worrying about matching those types, you should instead focus on what strengths and gaps your team has to consider to reach its goals. This awareness sets the team up for success rather than leaving things up to chance. The Team Discovery tool even provides recommendations based on your Team Type and Strategy Type combination.

PI Strategy Types



Exploring Strategies seek to create unique products/services.

Organizations with this strategy experiment with a wide variety of new ideas and initiatives to see what will have the biggest impact on the market—and their growth. They keep company goals flexible and steer clear of narrowly defined objectives. They ensure their processes are adaptable and decentralized; this allows the company to quickly enter new markets.



Bolstering Strategies seek to innovate while also engaging and retaining employees.

Organizations with this strategy prioritize both Exploring and Cultivating activities; They're in a transition period. They work to retain their top talent and create a sense of staff identity as they continue to experiment with a variety of market-focused innovations and new ventures. They define success both in terms of bringing unique products/services to market *and* maintaining high employee engagement.



Cultivating Strategies seek to build employee commitment, loyalty, and morale.

Organizations with this strategy invest in employee development *and* in their reputation as a good corporate citizen. Their structure and processes are predictable and accommodating so employees know what to expect—and can avoid work/personal conflicts. Innovation efforts are internal: Success is about engagement, maintaining a legacy, and fostering a positive climate.



Anchoring Strategies seek to improve internal processes and invest in employee experience.

Organizations with this strategy prioritize both Stabilizing and Cultivating activities; They're in a transition phase. They often have a well-defined market position, which allows them to refine existing services and focus more on their employees—and being a good corporate citizen. They innovate around the employee experience, but are selective about which business innovations to pursue.



Stabilizing Strategies seek to improve efficiency and predictability of services.

Organizations with this strategy determine how to improve or simplify internal procedures to minimize risk, trim margins, lower customer retention costs, and scale up rapidly. They standardize or automate processes, and pursue new innovations only after careful consideration. Success means achieving higher performance from existing offers and addressing service gaps to retain clients.



Executing Strategies seek to become more efficient and innovate through formal procedures.

Organizations with this strategy prioritize both Stabilizing and Producing activities; They're in a transitional phase. They implement structured company-wide systems to maintain consistency across customers, and they innovate by leveraging existing resources. Not comfortable with rolling the dice, they only take very strategic risks to ensure stability for their customer base.



Producing Strategies seek to acquire new customers and build a strong reputation. Organizations with this strategy make a name for themselves by outshining the competition. They utilize tactics around pricing, quality, and delivery of products or services, and they set processes to unify teams. They pursue innovations only if they add value to existing offers—or help distinguish them from competition. Success is about market penetration and market share.



Pathfinding Strategies seek to add customers while being open to innovation and partnerships. Organizations with this strategy prioritize both Exploring and Producing activities; They're in a transitional phase. They're moving to be more focused and organized around their most profitable or popular services. Innovation is common, But the focus is building offers that have traction in the market—while being careful not to disrupt existing customer relationships.



Adapting Strategies can indicate a lack of strategic focus or a split focus on competing objectives.

Organizations with this strategy may have an excessive amount on their plate due to lack of clear direction around what's needed for success. While it's possible to pursue a variety of strategic priorities, and it may even be necessary in some cases, moving in too many directions at once can lead to inefficient resource distribution, conflict around what to prioritize, and lack of clarity about what leadership and culture should look like.

Similarly to Adapting teams, Adapting strategies are commonly seen:

- when teams are newly formed and have not yet merged their objectives into one shared mission
- when a team needs a wide variety of people and roles to work together, each of whom have different areas of focus all relating to a common goal



Balancing strategies occur when strategic objectives are evenly prioritized across diagonal quadrants. There are two types of Balancing strategies: one balancing Innovation and Process, the other balancing Employee Experience and Results.

A strategy balancing both Innovation and Process seeks to promote both experimentation and efficiency.

Organizations with this strategy may have conflicting initiatives. On one hand, you seek to improve efficiency and predictability. On the other, you seek to create unique products and services. A Balancing strategy can happen when established companies seek to resolve issues with existing offerings while also competing with smaller, more flexible companies.

A strategy balancing both Employee Experience and Results seeks to build staff engagement and acquire new customers.

Organizations with this strategy drive individuals to outperform their peers while also promoting teamwork and mutual support. A Balancing Strategy can happen when organizations emphasize bottom line outcomes at all costs, leading to an intense environment and, sometimes, employee burnout - which they try to correct through a people-focused approach.

You will see the same icon for both types of balancing strategies, so be aware of where the team is balancing priorities prior to facilitating the workshop. It is important to note that due to the opposing nature of the behaviors and objectives of each of these strategies, the potential for friction may be higher than in other strategies. Pay close attention to the people who serve as balancers on this team; they will play an even more important role in ensuring that multiple viewpoints are heard and weighted evenly.



Better work, better world.